



CORPEUM<sup>®</sup>

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## CHANNEL PARTNER BROCHURE

FIND OUT HOW THE CORPEUM OPPORTUNITY CAN PUT POWER BEHIND YOUR BUSINESS  
WITH A BRAND NEW APPROACH ON CORPORATE PERFORMANCE MANAGEMENT.



# Memorandum

## 1. 1 Our Guiding Principles

- Our Channel Partners are an integral part of the CorPeuM “Approach”.
- CorPeuM is distributed exclusively via our Channel Partners.
- Making our Channel Partners successful is key to everything we do.
- Our Channel Partners will share in our success.
- We strive for quality and ethics at all times.



# Overview

CorPeuM is a new approach to Corporate Performance Management (CPM) that is set to revolutionize the way organisations manage strategy.

## 2.1 Background

Corporate Performance Management (CPM) is defined by Gartner as ‘... the methods, metrics, processes and systems used to monitor and manage an enterprise’s business performance’. It is a fast growing market that represents a great opportunity for software Channel Partners and consultants that are in the business of helping organisations to better implement strategy.

However, recent vendor consolidation in the CPM market (Hyperion acquired by Oracle, Outlooksoft and Business Objects acquired by SAP, Cognos acquired by IBM, Comshare acquired by Infor, etc.), has resulted in technology solutions that are a patchwork of different, highly priced, uncoordinated products that are unable to fully meet the needs of CPM. For example, most vendors offer scorecard or strategy management systems that are totally separate from their budgeting and reporting systems.

The people behind CorPeuM have extensive experience in developing, implementing and supporting many of today’s current offerings, and experienced these issues first hand. As a result they decided to build a new kind of application that would overcome these limitations and help to redefine the way CPM is implemented.

## 2.2 The CorPeuM Approach

CorPeuM is a ground-breaking new approach to CPM, aimed at mid-size companies (500M to 2B Euro revenue) and business units of larger organisations. Through a combination of business consultancy, revolutionary software and implementation methodology, CorPeuM fully supports the creation, implementation and monitoring of corporate strategy. It’s an approach that encompasses an organisation’s planning, budgeting, forecasting, reporting and risk management processes, but with a focus of linking these to the achievement of strategic goals.

In a single application organisations are able to totally integrate financial data with KPI information to allow managers to assess whether business strategy is working; whether their current actions/projects are the right ones; how these relate to organisational objectives; and whether the current and predicted costs involved are worthwhile.

Furthermore, CorPeuM’s unique and extensive set of workflow capabilities enables a true process-driven approach to performance management, where planning and reporting activities are triggered by events and exceptions rather than just by a date on a calendar, allowing them to make the most effective use of limited resources in an unpredictable world.





# Overview

## 2.3 Sales and Support Framework

The CorPeuM approach is exclusively sold and delivered to end-user organisations through accredited Channel Partners, who work in partnership with business consultants that advise and help implement programs on improving strategy execution.

As CorPeuM does not sell directly to end-users, all our sales and marketing efforts are geared towards making you, our Channel Partners, successful.

Channel Partners provide front-line support to customers, with CorPeuM providing a range of training support and helpline functions to Channel Partners that ensure issues are quickly resolved.

## 2.4 Channel Partner Qualifications

The typical profile of a CorPeuM Channel Partner is an organisation that has:

- Focus on Business Intelligence and / or Corporate Performance Management software.
- Experience in selling software applications to end-users.
- Dedicated Sales (team), including Pre-sales.
- Is – or has been – a Channel Partner or reseller of major BI / CPM software and / or application (e.g. Cognos, Hyperion, Outlooksoft, Frango, BO, Adaytum, Pillar, . . . . . etc.).
- General first (and second) level support desk for software.
- Entrepreneurial background / major shareholder(s) still involved in operations.
- Ability to work with third party management consultancy companies.





# Product

The development of the CorPeuM approach is focused on performance management and how this best helps an organisation execute strategy.

## 3.1 Development Focus

Our development team consists of experienced and acknowledged business experts, implementation consultants and product experts, who have performed this task with organisations around the world.

They also gain feedback from Channel Partners and consulting partners, with the aim of building the world's best performance management application that will directly support:

- **Strategic planning** – assessing market potential and internal capabilities; the setting of objectives, defining the strategies to be employed and the financial targets to guide execution.
- **Tactical planning** – the development of projects and activities that are assessed on their ability to achieve strategic goals while staying within set guidelines.
- **Financial planning** – creating a financial representation of the tactical plan including an operational budget and a capital budget.
- **Forecasting** – projecting current performance within the perceived business environment.
- **Management reporting** – analysing actual and predicted performance, highlighting unexpected variances and trends.
- **Risk management** – assessing risks and the preparation of contingency plans should those risks materialise.
- **Statutory reporting** – creation of financial accounts that meets international accounting standards.

## 3.2 Capabilities

Although CorPeuM is a single system, it is priced by functionality that is 'unlocked' for use through a software key. Capabilities include:

Basic platform consisting of:

- **Modelling** – the administration component to specify the business model, calendars and currency conversions
- **Processes** – allows administrators to model and control workflow within business processes including data import, data mapping, data entry, submission, validation and approval
- **Reporting** – that allows users to specify and access reports and analyses.
- **Security** – that assigns users to user passports that contain their roles, data access profiles, contact information and the language in which they interact with the system

Functional capabilities that can be added to the basic platform include:

- **Planning** – to support project based, time-shift and 'What If?' analyses.
- **Budgeting** – to support bottom-up / top-down budget process, data phasing and allocations.
- **Scorecards** – for the generation of dashboards and strategy maps.
- **Consolidation** – to support formal adjustments with audit trails to International Accounting Standards.

Over time, additional capabilities and report packs will be developed by CorPeuM and its partners, to meet specific requirements that will add greater value to the whole approach.



### 3.3 Pricing

The rental fee is calculated based upon the following elements:

- **Basic Platform:** this consists of functionality to define the business model; setup and control workflow including data entry and import; produce reports; and define users and their security profiles. This element is mandatory.
- **Advanced Functionality:** These elements are optional and include specific functionality for planning, budgeting, consolidation, scorecards, etc. Organizations licence what they want to use.
- **Number of Users:** The software will be priced according to the number of users; prices will be different if a user is an active user or a passive user (Participant). Generally speaking, active users can add to the structure of the application, participants can only enter data. Users have access to all licensed functionality.

### 3.4 Implementation Approach

Software is an 'enabler', which by itself does not solve business problems. This is only achieved when software is implemented to support the right processes using the right metrics. To this end, CorPeuM comes with an exclusive business consulting guide and senior executive workshop, which helps consultants to determine the right metrics and design the most effective management processes for improving the execution of strategy. The guide accommodates any existing management methodology that may be in use, such as the 'Balanced Scorecard', and how the output of an engagement can be implemented within the CorPeuM software.

The consulting guidelines have been developed specifically for CorPeuM and are based on best practices taught in management schools and found in business textbooks. Our Channel Partners and consulting partners are trained and certified in this approach.



# Marketing

CorPeuM adopts a collaborative approach to marketing, where resources and programs are tailored to a Channel Partner's particular market. It is only by making our Channel Partners successful that we are successful.

## 4.1 Resources

Resources provided to Channel Partners include:

- Office and web-based seminar materials on topical performance management subjects. These materials include invitation letters, agendas, web banners, slides with full scripts, and recommended follow-up actions.
- White papers that deal in depth with related CPM topics.
- Customer testimonials.
- Product brochures and factsheets on the CorPeuM approach.
- Modern, interactive website aimed at senior executives and those responsible for strategy execution, offering the possibility to download materials and register for seminars.

## 4.2 Central Programs

These ongoing programs run by CorPeuM directly are aimed at generating awareness of the CorPeuM approach, which in turn generates enquiries from consultants and end-user organisations, which CorPeuM will pass on to its Channel Partners:

- General interest seminars aimed at consultants on the CorPeuM approach.
- Regular briefings with key influencers on the CorPeuM approach.
- Release of magazine articles on topical CPM subjects.
- Regular press releases to all European press and opinion makers.
- Regular postings on blogs and other social media.

To increase market awareness, CorPeuM maintains a European wide database of people and publications that influence the market including online magazines, magazines, newspapers, journalists, academics,

consultants, market makers, and analysts.

CorPeuM will regularly provide these contacts with information on the CorPeuM approach and its success in the market, so that CorPeuM will increasingly become a major alternative in their thinking concerning CPM.

## 4.3 Local Programs

Channel Partners are expected to run a number of programs aimed at their local target market. As well as providing pre and post event resources, CorPeuM can also supply subject matter experts who can talk confidently and inspire audiences to take action.

## 4.4 Market Intelligence

Key to the success of any Channel Partner is understanding the market in which it operates and knowing how to deal with competitors. Because of our previous experience, many of our staff have extensive knowledge of what competitors offer and how to position CorPeuM as a superior solution. This information is continually being captured and is made available via an on-line database as well as through battle cards and end-user focused literature.

## 4.5 Social Media

Getting social and comprehending the new methods of communicating is very important to CorPeuM. The Internet and its associated communication streams has become the most important marketing medium. Therefore CorPeuM has developed an Internet focused marketing plan that will develop a collaborative online network between customers, market influencers and channel partners. This online network will be integrated with social media, such as LinkedIn, Facebook, Youtube, Vimeo, Slideshare, Twitter, ...





# Selling

Selling is about demonstrating to potential clients that our solution is the best for them, and that it can be delivered to meet their specific requirements.

## 5.1 Engaging with Consultants

Because of CorPeuM's focus on improving strategy execution, Channel Partners need to engage with relevant consulting organisations that can carry out the necessary workshops with CEOs and CFOs. To help with this, we provide to each Channel Partner:

- A database of major consulting companies and implementation partners in their area.
- News releases and general collaboration proposals.
- References amongst and between the same consultancy organisations .

We expect our Channel Partners to keep us informed of other BI and CPM specialists as well as consulting firms so that we can include them in our general communications.

## 5.2 Engaging with Academics

Another key to CorPeuM's success is to have the backing of recognised business school tutors, who influence both the current and upcoming generation of business leaders. The CorPeuM approach is already recognised in some academic circles – it is our aim to have this recognition world-wide. To this end we provide Channel Partners with:

- An up to date presentation for academics on the CorPeuM approach.
- A basic course on CPM including the CorPeuM differentiation, which can be tutored to students.
- Lecturers on CPM.
- Provide access to the book “Strategy to the Max”.

We expect our Channel Partners to establish relationships with major business schools in their region and endorse the approach outlined by the book “Strategy to the Max”, through press releases and joint white papers.





## 5.3 Sales Support

Sales support is provided through marketing materials that promote the benefits of the CorPeuM approach and that outline the fundamental differences from other vendors. We also provide white papers and links to blogs that can be used by prospective end-user organisations to form the basis of an evaluation.

Experienced, knowledgeable, CorPeuM staff are also available where necessary who can engage with senior executives of target organisations.

## 5.4 Channel Management

Each Channel Partner is assigned a CorPeuM Channel Partner Manager who works closely with them to agree marketing plans and training of Channel Partner staff. Their success is based on the success of the Channel Partner. As part of their responsibilities they can also help with particular sales issues and resolve any potential channel conflicts.

## 5.5 Lead Assignment and Tracking

From time to time, CorPeuM will receive leads that will then be assigned to a specific Channel Partner. The way that this assignment is made is clearly defined and understood by all Channel Partners.

All leads are tracked and responsibilities during the sales and implementation process are clearly identified. From this CorPeuM is able to gain what constitutes a successful sale and can spot where competitors have changed tactic that puts a sale at risk. This information is then passed on to all our Channel Partners.



# Technical

CorPeuM is built on a modern technology platform that takes advantage of the latest developments in performance management software.

## 6.1 Product Architecture

CorPeuM has been designed as a fully integrated Performance Management suite, using all the newest technologies available. It has been developed on top of the Microsoft BI platform, benefitting from the advanced technology this platform offers: scalability, reliability, combined OLAP and transactional processing, performance, manageability and easy integration with existing systems.

CorPeuM is deployed over the web using a zero-footprint Silverlight user interface, eliminating the need for local installations and updates. Once CorPeuM has been installed, the application can be set up and maintained by the end-users with little or no intervention from the IT department. No coding or technical knowledge is required to define the business model, create tasks and business processes, add business logic and build reports, dashboards and scorecards. A role based security model allows to define accurately the user access rights to data, functionality, reports and administrator functions.

CorPeuM uses a single central database and metadata layer. Its Service Oriented Architecture makes the business structures (metadata) and data inside CorPeuM available to other systems, assuring an easy integration into the existing IT environment and allowing IT to focus on its mission of data governance.

## 6.2 Technical Support

Channel Partners provide first and second level support to their clients. CorPeuM provides support to Channel Partners through a dedicated helpline, online support database and via on-site visits where necessary.





# Training

High quality training and on-going support are crucial to success. We provide Channel Partners with a range of courses that cover the selling and implementation of the CorPeuM approach. These courses can be both class-based and available as study materials from the CorPeuM SharePoint database.

## 7.1 Sales Training

Course sessions cover:

- Overview of the CPM market and positioning of major players.
- Overview of the CorPeuM approach and what makes it different.
- Selling the CorPeuM approach.
- How to deal with competitive situations.
- Using the CorPeuM Channel Partner support web site.
- Materials available and how they can help in sales situations.
- Registering and forecasting sales opportunities.

## 7.2 Business Consultancy Training

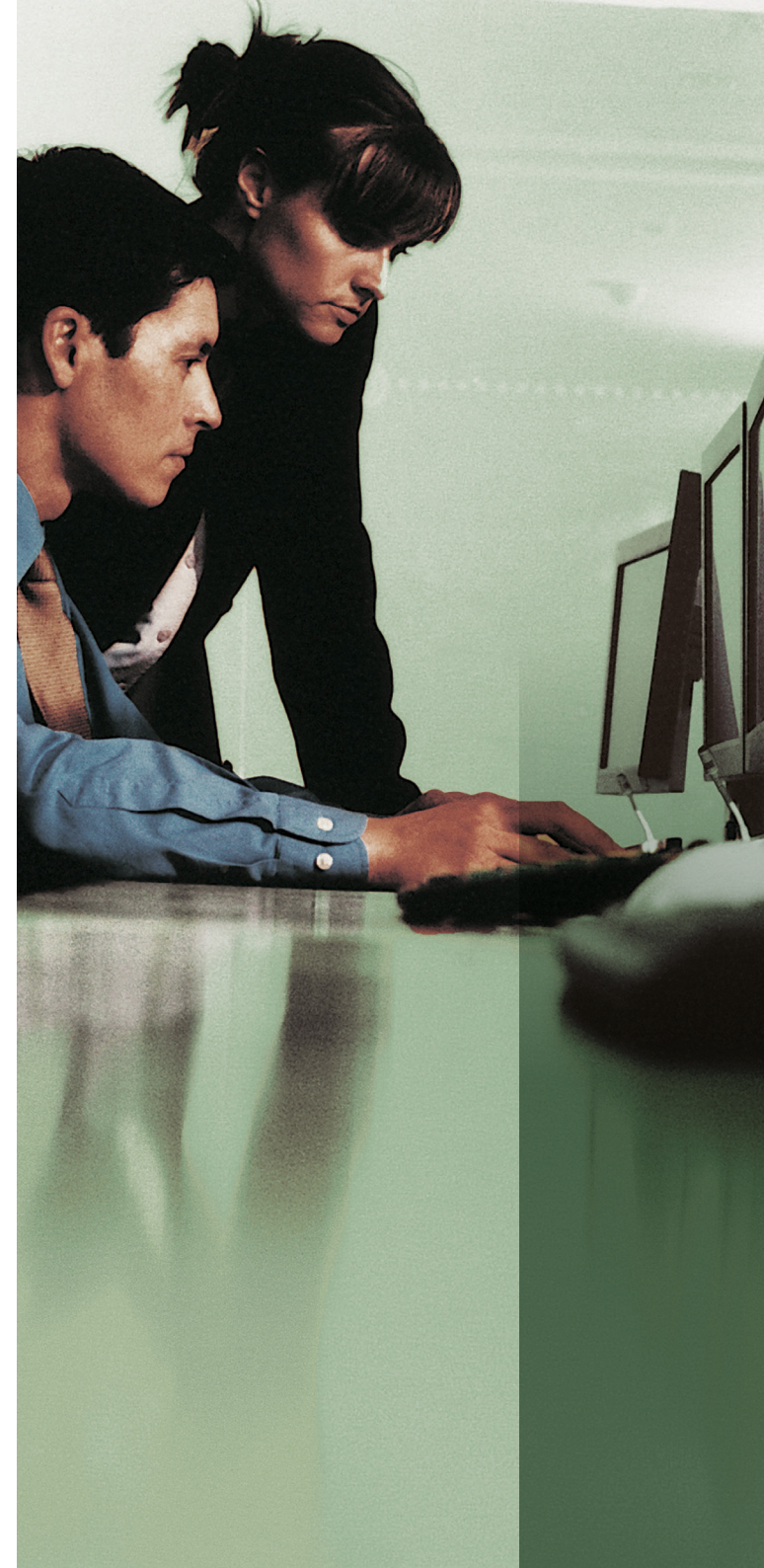
Course sessions cover:

- Overview of CPM and the benefits it brings to an organisation.
- Senior manager workshop on defining measures and processes that improve the execution of strategy.
- The CorPeuM approach – what it involves and how to conduct an engagement.

## 7.3 Implementation Training

Course sessions cover:

- Overview of CPM and the benefits it brings to an organisation.
- Installing CorPeuM software.
- Designing and implementing a CorPeuM application.
- Developing a bespoke CorPeuM module.





# Collaboration

Sharing information that is up to date and relevant is an essential part of any Channel Partner program. CorPeuM provides a range of methods to ensure this happens.

## 8.1 Channel Partner Portal

The Channel Partner Portal is an on-line warehouse for all materials relating to the promotion and implementation of the CorPeuM approach. Each Channel Partner has its own login, which gives them access to general materials and to a personal folder where they can hold private information such as local marketing plans, personalized prospect list and customized materials.

General materials available to all Channel Partners include:

- Marketing brochures, white papers, case studies and factsheets.
- Seminar materials.
- Marketing calendar for centrally run programs.
- Market intelligence database.
- Sales and academic presentations.
- Sales training materials.
- Business consulting guide and training materials.
- Implementation training materials.
- CorPeuM starter applications.

## 8.2 Channel Partner Meeting

Each year CorPeuM will host an annual Channel Partner Meeting where Channel Partners can receive updated training on selling and marketing the CorPeuM approach and a chance to find out what is working well in other regions. This will also cover changes to the competitive landscape and a forecast of how the business environment is likely to change.

## 8.3 Customer Conference

Each year CorPeuM will host an annual customer conference where Channel Partners can invite clients and prospects to find out the latest developments in both the CorPeuM approach and the business environment. It gives an opportunity to show prospects that CorPeuM is more than just a software company, and has become the industry thought leader in improving performance management.

If you would like to become a CorPeuM Channel Partner, you can contact [partner@CorPeuM.com](mailto:partner@CorPeuM.com)

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